

Upstream Dialogue

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THE FACTS ON:
OIL SANDS
2010

CAPP CANADIAN ASSOCIATION
OF PETROLEUM PRODUCERS

The Facts on Oil Sands

Our research indicates that Canadians want a balanced discussion about energy, the economy and the environment. CAPP has developed a new pocket book that gives you fast, easy access to oil sands facts to help you get in on the discussion.

► [Access the facts and get in on the discussion.](#)

CAPP Events & Updates



Energy in Action 2011 May 2 – 27, 2011

► Learn how your company can get involved in this grassroots event.

Responsible Canadian Energy Awards (formerly the Steward of Excellence Awards) March 23, 2011

► [Learn more about the awards.](#)

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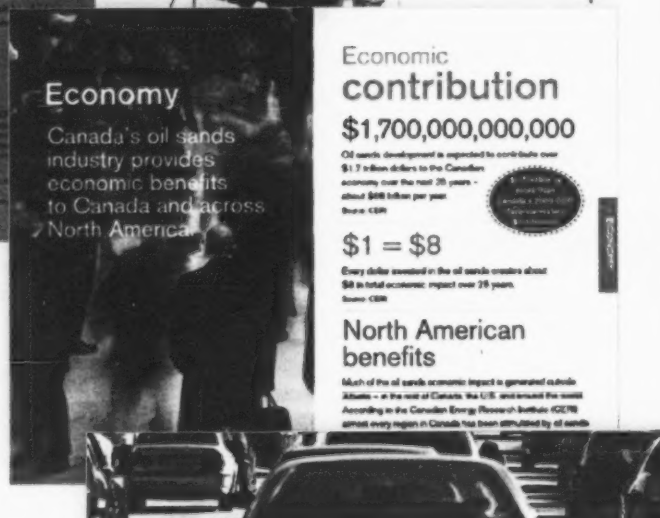
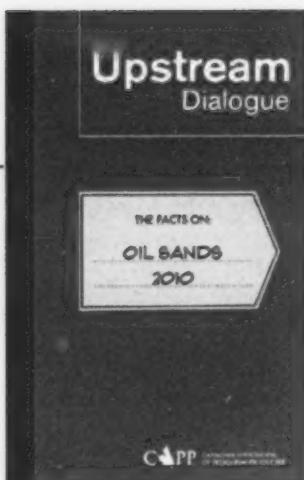
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The Facts on Oil Sands

CAPP's e-newsletter started in 2008 - providing broad industry information, updates and stories in an easy-to-read, non-technical format to industry employees and people with an interest in learning more about our industry.

The Upstream Dialogue toolkit is now expanding to include resource-specific fact books. The Facts on Oil Sands is the first of these fact books.

CAPP's research indicates Canadians want a balanced discussion about energy, the economy and the environment. This pocket book is designed to give you fast, easy access to oil sands facts that will help you get in on the discussion. Facts are sourced from credible third parties or are developed using CAPP data that is checked against other data sources, including government reports.

- ▶ Check out the on-line version of [The Facts on Oil Sands](http://TheFactsOnOilSands.ca).
- ▶ Order a printed copy of The Facts on Oil Sands - email your request to upstreamdialogue@capp.ca.

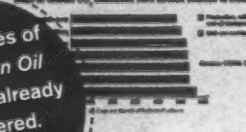
GHG emissions

Carbon dioxide (CO₂) is a GHG. CO₂ is emitted into the air by burning fossil fuels for electricity generation, industrial uses, transportation and for heat in homes and buildings.

Waste-to-Energy
Recovering CO₂ emissions from the start of oil production (avoiding through to combustion (tailpipe) is called a well-to-wheels analysis.

Sustainability
Oil sands crude has similar CO₂ emissions to other heavy oils and is 6% more intensive than the U.S. crude supply average on a well-to-wheels basis.

Wells to Wheels CO₂ emissions from various sources of oil



GHG reductions 39% better

Since 1990, GHG emissions associated with every barrel of oil sands crude produced have been reduced by 39%.

Source: Government Canada

Regulated
The Government of Alberta implemented GHG regulations in 2007 (the first jurisdiction in North America to do so) requiring a mandatory 1.2% reduction in GHG emissions intensity for all large industrial sectors including mining of oil sands facilities, or a payment in lieu of carbon price at \$15/tonne.

CCS

The Federal and Provincial governments are investing approximately \$3 billion to help make Canada a global leader in carbon capture and storage (CCS) technology. Industry and government are cooperating to demonstrate the commercial and technical viability of CCS in Canada.

Source: Alberta Environment

70,000 copies of The Facts on Oil Sands have already been ordered. Request your copy today.

RESPONSIBLE CANADIAN ENERGY™

The Responsible Canadian Energy™ Awards (formerly the Steward of Excellence Awards) is an annual event to recognize CAPP members who have demonstrated exceptional performance in their commitment to the responsible development of Canada's petroleum resources.

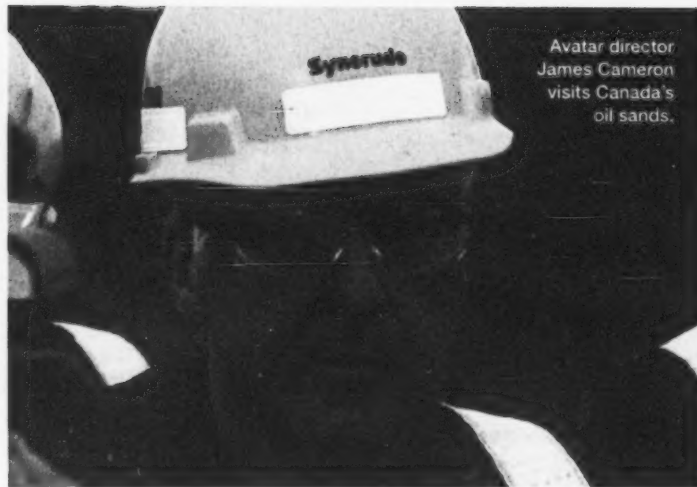
For tickets, or for more information contact Rachel Turner at rachelturner@capp.ca

Check out last year's award nominees at capp.ca/RCE

Save the Date

March 23, 2011
5:30 pm to 9:00 pm
Calgary Hyatt Regency
700 Centre Street SE,
Calgary, Alberta
T2G 5P6

CAPP CANADIAN PETROLEUM ASSOCIATION
AN OIL PRODUCERS' ORGANIZATION



Avatar director James Cameron visits Canada's oil sands.

Industry in the News

News highlights

European politicians praise oilsands

November 3, 2010, CBC News

- Read this [article](#) that comments on how a visit to the oil sands changed the perspectives of some European politicians.
- Listen to a podcast of the post-visit media conference, posted on Government of Alberta blog, [Your Alberta Blog](#).

Duck death toll from oil sands waste pond landings rises to 350

October 28, 2010, The Edmonton Journal

- Read this [article](#) by Mariam Ibrahim and Hanneke Brooymans.
- Read Calgary Herald article, [Yedlin: Duck deaths a case of bad timing](#), by Deborah Yedlin.
- Read Suncor statement, [Update on Waterfowl Incident](#).
- Learn more about [tailings ponds and the innovation and technology](#) used to deter ducks from landing on them.

Bird Deterrent Systems



Watch a video of Calvin Duane, Manager of Environment at Canadian Natural, explaining how the company's bird deterrent system works. ►

Canada's Oil Sands

Come see for yourself.

Have you toured the oil sands?

You've seen the photos. Now, explore the facts behind the mines and wells.

Learn what the oil sands are and how they're developed as well as what's being done to protect the environment, pioneer technology, reclaim land, engage communities, and provide economic opportunities.

Watch *Canada's Oil Sands: Come see for yourself* ►

Q&A: Avatar Director James Cameron on Oil Sands and Environmentalism

September 29, 2010, Time Magazine

- Read this [article by Bryan Walsh](#) who traveled with James Cameron as he toured Alberta's oil sands.
- Read National Post article, [Cameron more nerd than crusader during oil sands visit](#), by Kevin Libin (Sept. 28, 2010) who also toured the oil sands with James Cameron. Kevin ["tweeted"](#) from the tour.

Alberta recruits scientists to review oil sands water data

September 25, 2010, Edmonton Journal

- Read this [article by Hanneke Brooymans](#).

Oil Sands Greenhouse Gas Emissions are Lower than Commonly Perceived, IHS CERA Analysis Finds

September 21, 2010, IHS CERA news release

- Read [IHS Cambridge Energy Research Associates' \(IHS CERA\) announcement](#) of its comprehensive assessment of where oil sands fit in the spectrum of U.S. crude imports.
- Access the report, [Oil Sands, Greenhouse Gases, and U.S. Oil Supply: Getting the Numbers Right](#).

Oilsands a 'national treasure,' says U.S. senator after tour

September 18, 2010, Calgary Herald

- Read this [article by Jason Fekete](#) that highlights comments from three U.S. senators after their visit to the oil sands.
- Watch a [CBC The National webcast](#) interview of U.S. Senator Lindsey Graham (Sept. 28, 2010).
- Read Edmonton Journal article (Oct 2, 2010), [U.S. senators table pro-Alberta oilsands bill](#), by Keith Gerein.

On par

Oil sands crude imported to the United States results in GHG emissions that are, on average, six per cent higher than the average crude consumed in the country. This level places oil sands on par with other sources of U.S. crude imports, including crudes from Nigeria, Venezuela and some oil produced in the U.S.

Source: IHS CERA

- Read more oil sands facts.



CAPP "tweets" from Seismic in Motion 2010



Tony Rino, CAPP

Every October the Canadian Association of Geophysical Contractors (CAGC) hosts a three day field trip called Seismic in Motion (SIM). The event showcases a variety of activities encompassing seismic in the oil and gas industry including some of the industries' newest technologies. The event is open to the public with several groups of students and industry employees attending.

CAPP's Web Communications Advisor, Tony Rino, attended SIM2010 and "tweeted" his experiences via CAPP's twitter account.

- Check out Tony's [tweets and twitpics](#) (Note: Scroll down to October 5th, 2010).

Bill C-469

CAPP Submission

On November 16, 2010 CAPP appeared before the House of Commons Standing Committee on Environment and Sustainable Development to speak in opposition to *Bill C-469 "An Act to Establish a Canadian Environmental Bill of Rights"*.

- Read CAPP Vice President for Policy and Environment, Tom Huffaker's [submission on Bill C-469](#).

Energy Security in Canada

CAPP Presentation

On November 25, 2010 CAPP presented to the House of Commons Standing Committee on Natural Resources in regards to the committee's study of Energy Security in Canada.

- Read CAPP President, Dave Collyer's [presentation, Energy Security in Canada](#).



"Competition is healthy. It puts you in a better position and it's good for everyone – for all Albertans."

Marco Abdi has weathered plenty of ups and downs in the energy sector since opening his Calgary restaurant, La Brezza, in 1985. The downturns translate into empty tables at his restaurant.

► Read [Marco's story](#).

Industry in the News (continued)

Alberta is Energy **UPDATE**

The global recession shook the world's economy and Alberta did not escape negative impacts. As our industry emerges from recession it is important we continue to look forward, not back.

In March the Government of Alberta released a Competitiveness Review ensuring the province was positively positioned to compete globally for investment dollars. On the heels of this announcement CAPP along with the Small Explorers and Producers Association of Canada, the Canadian Energy Pipeline Association, the Canadian Association of Oilwell Drilling Contractors, the Petroleum Service Association of Canada, the Canadian Association of Geophysical Contractors, the Calgary Chamber of Commerce, the Canadian Manufacturers and Exporters and the Alberta Enterprise Group launched the Alberta is Energy campaign.

Alberta is Energy highlights the important relationship that exists between a healthy industry and a thriving economy, and

the positive impact the oil and gas industry has on communities throughout the province.

Alberta is Energy traveled the province, making stops in Calgary, Lloydminster, Brooks, Fort McMurray, Medicine Hat and Grande Prairie to discuss with local community leaders the role of the oil and gas industry in their communities.

With two more events planned for this year in Lethbridge and Edson and Alberta's economy regaining strength CAPP looks forward to further engagement with Albertans on issues important to them and their communities.

We are working together to define our new Alberta, realize our potential and build a better future.

► Find out more about [Alberta is Energy](#).

► Access the latest [Alberta is Energy newsletter](#).

Oil sands initiative **UPDATE**

As part of the Canadian oil sands industry's ongoing performance and communications initiative, a new television advertisement and two web-based videos have been launched. The ad and vignette's feature real oil sands industry employees: Devon's Gordon Lynch, Syncrude's Ron Lewko and Canadian Natural's Calvin Duane.



Employee Perspectives

Keeping a weather eye

Name: Bernie Beaupertuis

Title: East Coast Logistics Lead

Company: Suncor

Years of experience: 36

Location: St. John's, Newfoundland and Labrador

Best Part of the Job: "Depending on the season and the weather, every day is different."

Success story: Moving people and supplies safely back and forth between offshore projects and St. John's.

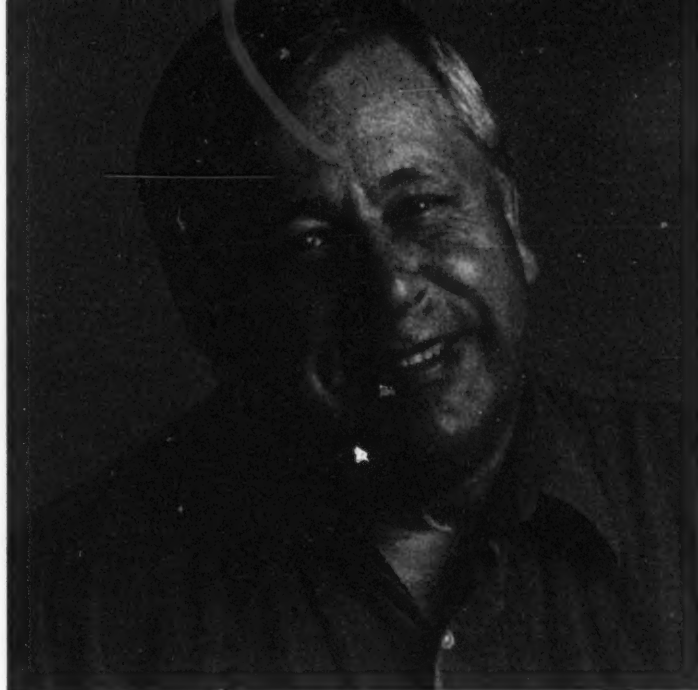
Bernie Beaupertuis is well-known in St. John's for a number of reasons. In part, because he's Suncor's longest serving employee – with more than 30 years under his belt, he knows almost everyone in the East Coast oil and gas business. The big reason, however, is that he's Logistics Lead. If it goes offshore, flies in the air or sails on the sea, Bernie is involved. He's part of an overall logistics team that keeps people and supplies moving smoothly offshore Newfoundland and Labrador. Bernie is always thinking about safety and business and one of his biggest challenges is the weather.

The number of moving parts varies from day to day. When the fog is thick and helicopters are grounded, there may be as many as 25 sailings a month. It all depends on the weather, Bernie says.

"Starting in September, you deal with the wind. Then you've got the ice season. Then, you've got the fog season and then you've got your short summer; two weeks without skating," Bernie says with a laugh.

While summer tourists in St. John's are delighted to see icebergs out at sea, icebergs are a less welcome site for Bernie and his team.

"Icebergs can be very time consuming" he says. "It's a chess game. Sometimes you can't see them because it's fog season. You get targets on your radar but it could be a fishing boat it could be an iceberg so we have to send boats to check them



out and then we check the trajectory." Only then can Bernie and his team start planning logistics.

And at any given time, that plan may change. Take the day last May when one of his supply boats, the Burin Sea, helped rescue the crew of a fishing vessel that had abandoned their burning boat for a life raft in three metre seas.

"If my dog is hiding under the bed I know there is a storm coming. You have to look at the wind; if you get easterly wind, it doesn't matter if it's northeast, southeast, or easterly you know it could be a problem."

"It's the law of the sea and that's the way it works," says Bernie. "Our boat was in the right place at the right time." The supply vessel was about an hour away and when it got closer, it launched two Fast Rescue Crafts (FRCs) to retrieve the fishing crew from their life raft.

"We do a lot of practice drills with our crews for this kind of rescue, it's part of our training," says Bernie. "I am sure that had something to do with this being a successful story."

The rescue operation took the Burin Sea half an hour to complete. All five fishing crew members made it ashore, safe and sound.

"When you're on the sea, whether you're a fisher, a supply vessel, coast guard or a cruise ship, you obey the rules of the sea," says Bernie. "If you're able to do so safely, you always help a fellow mariner in distress. We're just glad the Burin Sea, and its outstanding crew, was there to help".

► Learn more about [Canada's offshore oil and gas industry](#).

This mature fine tailings surface is just 14 days old, and it's already dry and solid enough to walk on.

Innovation and Technology

Tailings evolution: Accelerating drying time from decades to weeks

In June, Suncor Energy received approval for its tailings management plan from the Energy Resources Conservation Board (ERCB). The plan proposed the expansion of a new approach to tailings management called TRO™ (Tailings Reduction Operations). If successful, TRO™ has the potential to literally change the landscape of tailings ponds.

"In the 1960's when Suncor started production at the oil sands, the vision was simple: the tailings material would settle, the water would be drawn off for re-use and the settled material could be capped with soil and revegetated," says Bradley Wamboldt, director of TRO™. "But 40 years of experience has taught us that Mature Fine Tailings (MFT) doesn't settle in a reasonable time frame."

As a result, over the years Suncor has required more and larger tailings ponds. In the last ten years, Suncor has been using consolidated tailings technology to convert MFT to a material solid enough to handle the weight of traffic, but it still takes decades for tailings to become firm enough to be reclaimed.

MFT drying is the key technology in the TRO™ application. Using this new process, tailings material will be deposited into in-pit beach areas where all the coarse sand and some of the fine clays will be placed. The remainder of the fine clays and water will be transferred to an existing tailings pond to settle into MFT, and then dried

using MFT drying – a proprietary Suncor process using additives to expedite settling of the fine clays. The dried clays can be reclaimed in place or moved to other areas, depending on space requirements.

TRO™ is expected to reduce existing tailings ponds and eliminate the need for new ponds associated with current mines. If successful, TRO™ will reduce the oil sands mine footprint, allow for faster land reclamation, free up more water for recycling and reduce the need for additional fresh water withdrawals.

Suncor has been researching, developing and testing the TRO™ technology since 2003. The company will rapidly accelerate the implementation of TRO™ across its existing operations.

"We expect to invest more than \$1 billion to implement our new TRO™ technology, potentially reducing tailings reclamation time by decades," said Suncor's Kirk Bailey, executive vice president, Oil Sands.

The Alberta government recently revised industry-wide requirements for tailings operations including specific performance criteria for the reduction of fluid tailings and decreasing the number and size of tailings ponds. Other oil sands mining companies are also developing accelerated tailings technologies.

- Read more about **TRO™**.
- Learn more about our industry's **innovation and technology initiatives**.

Tailings

After the oil sands have been mined, oil is separated from the sand and sent for further processing. "Tailings" are the leftover mixture of water, sand, clay and residual oil.



Tailings Ponds

Tailings ponds are large engineered dam and dyke systems designed to contain and settle the water, sand, fine clays, silts, residual bitumen and other by-products of the oil sands mining and extraction process.



Mature Fine Tailings (MFT)

After separation, the middle layer consists of a yogurt-like combination of water and clay that can take several decades to separate and dry out.

Note: Tailings ponds are only used for the mining method of extracting oil sands.

New technology accelerates tailings drying time, speeding up reclamation.



Watch a video about TRO™ (Tailings Reduction Operations)



Relationships behind the Resource

Learning from Deepwater Horizon

In late October, industry representatives from Chevron and Suncor along with representatives from the fishing industry in Newfoundland and Labrador met face-to-face with their industry counterparts in the U.S. Gulf Coast states to discuss lessons learned from both industry's perspective on the Deepwater Horizon spill and response.

The joint industry delegation met with fishing and petroleum groups in Louisiana, Mississippi and Alabama. The trip was organized by ONE OCEAN – a Canadian organization that facilitates communication and information sharing between the Newfoundland and Labrador's fishing and petroleum industries [► sidebar].

"Preventing oil spills has always been a priority for the energy industry, and the trip to the Gulf Coast provided another opportunity to learn from and share information with the fishing industry, says Dr. Art May, Chair of the ONE OCEAN Board. "This trip will assist our industries in identifying areas they can work on together regarding oil spill prevention and response in this province."

10%

Newfoundland and Labrador produces about 270,000 barrels of crude oil per day representing 10 per cent of Canada's total crude oil production.

Gulf Coast fisheries representatives discussed how fishers experienced communication challenges immediately following the oil spill incident, as they were unclear as to what organization was leading the clean up; the operator, the

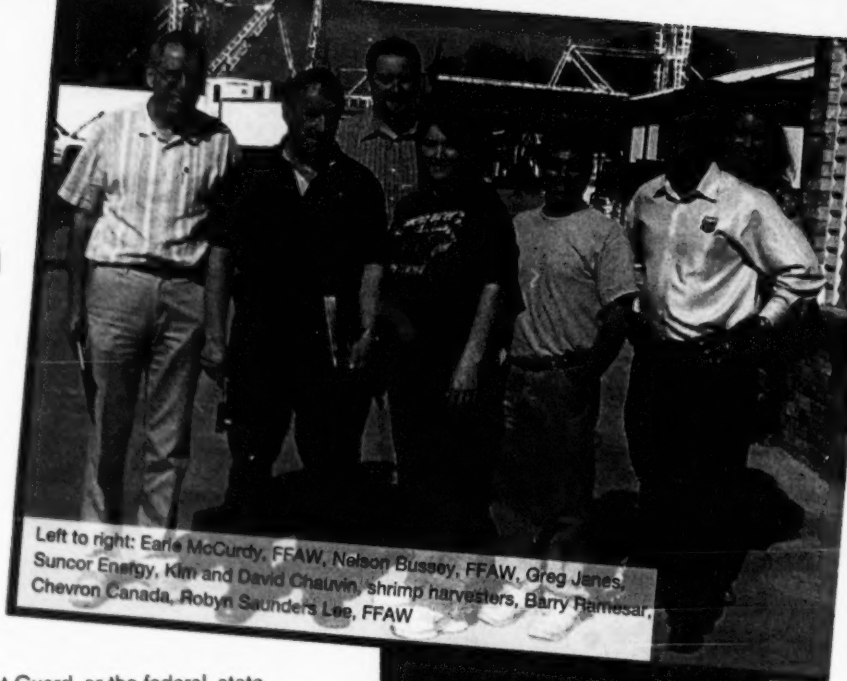
Coast Guard, or the federal, state or municipal government.

Gulf Coast representatives suggested a mechanism such as ONE OCEAN would have been useful to help the two industries communicate in a more timely fashion. Both U.S. industries agreed it would have been very productive to have some fishers trained in oil spill response techniques and an available data base of fishing vessels that were in the region to help in the clean-up effort.

Paul Barnes, CAPP's Atlantic Canada manager, said the trip had many benefits for both industries in Newfoundland and Labrador. "As the petroleum industry continues to grow, the need increases for a practical forum to discuss how both these industries can continue to co-exist in a sustainable manner," he says.

The president of the Newfoundland and Labrador Fish, Food and Allied Workers (FFAW) union, Earle McCurdy says trips like this are helping the fishing and petroleum industries build a cooperative working relationship.

"The best way to learn from the spill in the Gulf of Mexico is to get a first-hand account from people who were involved and affected by the spill," says McCurdy.



Left to right: Earle McCurdy, FFAW, Nelson Bussey, FFAW, Greg Jones, Suncor Energy, Kim and David Chaurvin, shrimp harvesters, Barry Ramesar, Chevron Canada, Robyn Saunders Lee, FFAW

ONE OCEAN

ONE OCEAN is a liaison organization established by the fishing and petroleum industries of Newfoundland and Labrador. Under the direction of an industry board, ONE OCEAN will promote mutual understanding between these two vital industries and their common marine environment.

ONE OCEAN organizes workshops, commissions research and other initiatives that promote cooperation between the fishing and petroleum industries in Newfoundland and Labrador.

► Learn more about [ONE OCEAN](#).

"The trip sends a clear message that both industries have concerns about the incident and are willing to resolve them together so we can head off potential problems or conflicts."

A trip report will be presented to the ONE OCEAN board of directors.

► Learn more about [Newfoundland and Labrador's offshore oil and gas industry](#).

Industry Practice and Regulations

NEB Review

The National Energy Board (NEB) released the final scope of the Arctic Offshore Drilling Review. The public review of drilling requirements will address drilling safety while protecting the environment, responding effectively if there is an incident, and lessons learned from the Deepwater Horizon incident in the Gulf of Mexico.

The NEB review will proceed in three phases (timeline TBD):

PHASE 1

Fact finding/information gathering
(currently underway)

PHASE 2

Examination and consideration of
facts and information gathered

PHASE 3

Public report



Phase 1 is underway and could go into 2011, depending on the release of some external reports into the Deepwater Horizon incident. As part of Phase 1, the NEB has asked for information on a number of topics including management systems, safety culture, training and competency, accountabilities and responsibilities, effectiveness and reliability of well control methods, state of preparedness to respond to drilling accidents, same season relief wells, and financial liability.

CAPP has formed an NEB Review Working Group to coordinate industry responses for Phase 1 of the review.

The NEB is an independent quasi-judicial tribunal and does not establish government policy.

► Check out a complete [NEB review Q & A](#).

Survey of inactive wells in AB

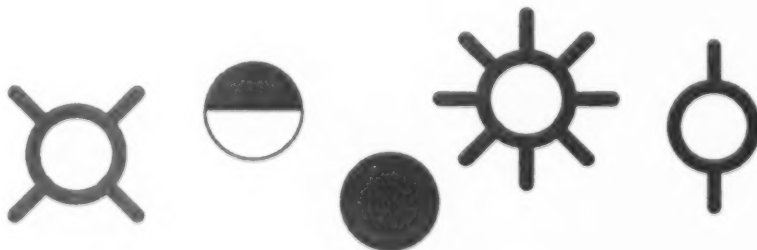
CAPP has analyzed the results of a voluntary survey that asked oil and gas companies to assess and categorize the life-cycle status of conventional inactive and abandoned/unreclaimed wells.

The survey was intended to generate representative data and provide further clarity on the end-of-life status of approximately 60,000 inactive wells and 34,000 abandoned wells in Alberta in an effort to avoid any reactionary regulatory action.

Data analysis was completed in October and has been sent to the provincial government for review. The survey identified 29,751 of Alberta's inactive wells still have production potential, 3,590 have potential for other use and 26,878 have no potential. CAPP will collect similar data in 2011 and 2012 to identify trends.

The survey data provides the information required to determine the scope of the issue and what is needed to manage the issue efficiently.

CAPP will continue to meet with government and will work to ensure any policy and regulatory decisions are practical and protective of assets. Government decisions are expected in 2011.





Ottawa waives tariff

The federal government announced a new duty remission framework that waives the 25 per cent tariff on imports of all general cargo vessels and tankers, as well as ferries longer than 129 metres.

Canadian offshore operators use these vessels in project construction, production and facility maintenance activities. These vessels are not typically built in Canada.

Waiving the tariff will lower costs for offshore operators and increase the attractiveness of investment in Canada's offshore industry.

CAPP urged government to remove the tariff suggesting it increased costs to offshore oil operators while providing no benefit to the Canadian shipbuilding industry.

CAPP will continue to lobby for the expansion of the duty remission to cover vessels used longer than 129 metres.

► Learn more about the [duty remission framework](#).

Priorities for reforming regulations

CAPP and nine other industry associations collaborated on a submission to Alberta's Regulatory Enhancement Project, which is reviewing the province's regulatory system for oil, gas and oil sands development.

The joint submission – representing the views of hundreds of Alberta businesses on behalf of tens of thousands of employees – outlines three priorities for strategic reform:

1. Establishing a more integrated policy framework
2. Consolidating regulatory oversight into a single regulator
3. Establishing a more systematic risk-based approach to allocating regulatory oversight through improved selection of policy assurance instruments

The submission also includes recommendations regarding cumulative effects, regional monitoring frameworks and aboriginal consultation frameworks.

The integrated package of strategic recommendations will, taken together, significantly enhance Alberta's competitiveness and ensure responsible environmental outcomes.

The province is expected to release recommendations by the end of the year.

► Request a copy of the joint submission, contact Brad Herald at brad.herald@capp.ca.

Making Room for Oil Sands

CAPP provided suggestions for drafting the Lower Athabasca Regional Plan in view of advice given to the province of Alberta by the Regional Advisory Committee (RAC) for the Lower Athabasca Region.

The province is developing land use plans for seven regions across Alberta. The Lower Athabasca region, in northeastern Alberta, contains most of province's oil sands resource.

While CAPP endorses much of the advice given by the RAC, the advice does not describe how to achieve environmental and social outcomes while gaining the greatest value out of the oil sands development as a safe, secure and reliable supply of

energy. CAPP identified the need for the regional plan to improve the predictability of development decisions while ensuring responsible environmental and social outcomes.

CAPP asked the Government of Alberta to:

- Describe the process to respect tenure or compensate for harm;
- Define conservation areas and the intended timing and scale of implementation;
- Fill provincial policy gaps such as developing workable, provincially-managed caribou policy;

- Assess impacts of multiple access restrictions on achieving the economic outcomes; and

- Create appropriate effects-based management strategies to ensure responsible oil sands development.

CAPP continues to work with the government to ensure industry's views are understood and a workable regional plan is developed.

- CAPP members can see CAPP's complete submission on [MemberNet](#).
- Read more about the [Lower Athabasca Regional Plan](#).

Fostering Effective Aboriginal Relationships

This information sheet was developed as an addition to CAPP's oil sands information package. The sheet provides an overview of how oil sands operators work with Aboriginal peoples to minimize development impacts and provide community benefits and employment.

- ▶ Access the [Fostering Effective Aboriginal Relationships](#) fact sheet.
- ▶ Access the full [oil sands information package](#).



Canadian Association of Petroleum Producers (CAPP)

The Canadian Association of Petroleum Producers (CAPP) represents companies, large and small, that explore for, develop and produce natural gas and crude oil throughout Canada. CAPP's member companies produce about 90 per cent of Canada's natural gas and crude oil. CAPP's associate members provide a wide range of services that support the upstream crude oil and natural gas industry. Together CAPP's members and associate members are an important part of a \$110-billion-a-year national industry that provides essential energy products. CAPP's mission is to enhance the economic sustainability of the Canadian upstream petroleum industry in a safe and environmentally and socially responsible manner, through constructive engagement and communication with governments, the public and stakeholders in the communities in which we operate.

If you would like to receive this newsletter directly from CAPP, email your request to upstreamdialogue@capp.ca.

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